\* M:Metrics sample projected to 219 million estimated individual subscribers

## Winter 2008

## Wireless in America

## UNITED STATES WIRELESS SNAPSHOT Source: M:Metrics: three-month average ending Nov. 2007. n = 33.237 U.S. mobile phone users Subscribership Approaches 250 Million Non-Subscribing 800 \$0.50 Population 700 \$0.45 250m Monthly Minutes of Use \$0.40 19% 600 \$0.35 200m 500 \$0.30 400 \$0.25 150m \$0.20 300 \$0.15 100m 200 \$0.10 100 Revenue Per Minute \$0.05 81% 50m Year Q4 Q5 Q6 Q7 Q8 QQ DD D1 D2 D3 D4 D5 Minutes of Use Per Month Avg Revenue Per Minute Ju-00 Jun-01 Jun-02 Jun-03 Jun-04 Jun-05 Jun-06 Jun-07 Wireless Subscribers Wireless Value Wireless Penetration 20% 2% Grammar school 8% Some high school 13% 22% 18% 11% 13-14% 17 \$0-\$25k 17% 12% Completed Bachelors high school 14% \$75-\$100k degree 25-34 Some college 45-54 18% (but no degree) \$50-\$75k 25% 16% 35-44 00% 31% Accordance 21% 19% Age\* Education\* Income\* Personal contract; self-pay Family plan. 70m personally Corporate responsible Contract 60m Family plan; other Personal 50m family member contract: responsible 40m partial reimburse In 2006, wireless carriers 2006, wireless service 30m Pre-Paid Personal employed more than 257,000 providers' revenues constituted 20m contract: Unspecfd. people in the US with total more than \$125 billion of the employer 10m reimburse wages of more than \$12 billion. nation's economy. 1% 26% 21% 3% 12% 3% Wireless Employees Wireless Revenues Payment Option

Additional Sources: U.S. Bureau of Labor Statistics: U.S. Federal Communications Commission: CTIA



Efficient Use of Spectrum --Subscribers Served

per MHz of Spectrum Allocated USA

Japan

Subscribers**	243.3m	103m	91.1m	71.4m	50.2m	85.2m	19.1m	48.1m	42m	62m
Average Consumers' Minutes of Use per Month**	823	140	101	168	258	134	429	163	321	144
Average Revenue per Minute – A Measure of the Effective Price per Voice Minute**	\$0.04	\$0.25	\$0.21	\$0.20	\$0.17	\$0.19	\$0.10	\$0.23	\$0.11	\$0.11
Top Two Carriers Percentage of the Total Market**	51.7%	78.6%	72.4%	49.6%	82.5%	73.4%	68.3%	77.5%	82.4%	90.7%
Number of Carriers with over 1m Subscribers **	10	4	4	5	3	4	3	3	3	4

202.381

133.902

374.9

MHz

273.603

311.4

MHz

106.111

180

MHz

134.358

358

MHz

180.257

233

MHz

516.667

120

MHz

U.K.

France

Italy

Canada

Germany

S. Korea

Mexico

Spain

296.830

298.689

827.891

Spectrum Allocated for Commercial Wireless Use

294 MHz\*

347 MHz

305 MHz

352.8 MHz

<sup>\*</sup>Figure Includes AWS-1 and 700 MHz spectrum – which is not yet available for commercial use.
\*\*Glen Campbell, et al., "Global Wireless Matrix 2007." Merrill Lynch. Oct. 4, 2007, at Table 1.